<u>Final Themes for BD Planning</u>

Key Principles:

- Plan for Zero Headcount
- Identify the bottom 10%+ of what your team does & refocus on higher impact projects

3 Major Phases

- Support Play-Wide Planning + Ideation on BD questions/STOP/START (by Sept 12)
- Alignment on Key Themes for BD in 2019 (by Oct 25)
- Refinement of Key Themes to Final Strategy & OKRs (complete Jan 12)

2019 <u>Play-Wide</u> Planning Schedule: *(This is an FYI unless you're already working on it)*

Date	Milestone	Owner
08.06.2018 - 09.06.2018	<u>Teams work on 2-Pagers</u>, owners (briefly) update on progress at Play XFN weekly (*note: template will be updated to provide a section for 2-pager updates*).	Theme Owners
08.13.2018 - 08.17.2018	Offline directional review of docs for early feedback	Mike Hochberg Tian Lim, Doug Lucas Purnima Kochikar
09.06.2018 - 09.07.2018	Play Planning Summit MTV-1055-1-Hearty (160) [GVC] *Note: Exit criteria is alignment on strategy and prioritization within each theme's 2-pager.*	Play Leads
09.10.2018 - 09.14.2018	Generate prioritized project lists for all Themes	Theme Owners
First week of Oct	Hiroshi Review	Leads
Last week of Oct	Ruth Reviews (might slip to first week of Nov)	Hiroshi, Sameer, Jamie

2019 BD Planning Schedule:

Date	Milestone	Owner
08.06.2018 - 09.06.2018	Contributors work on Play-Wide 2019 Planning	BD Contributors (listed here)
08.13.2018 - 08.27.2018	Identify Topics to Address in BD Planning. - Add Key Questions, START & STOP ideas to this doc below - AI [Leads]: Brainstorm w/ your team to drive Key Questions, START / STOP (Template for each team is optional)	Leads
9.14.2018	Combine Inputs from Play-Wide Planning + BD Inputs (questions, START, STOP) into Themes to address in BD planning. - Assign owners/teams for each theme.	Purnima + Mike
09.27.2018 - 10.22.2018	Team's work on 2-pagers to address each Theme	Theme Owners
10.11.2018	Directional Review of Themes Progress w/ Leads @ SteerCo	Leads
10.23.2018	Leads Offsite: - Review Theme 2-pagers - Review STOP & START ideas	
10.27.2018 - 12.1.2018	Refine BD 2019 Strategy into Presentation.	Mike, Pat
11.1.2018 11.15.2018	Portfolio Optimization for 2019 complete.	

Comment [1]: +Michael Marchak
Do we need to prep Stop/Start ideas for leads offsite?

Comment [2]: Partner with Pat on this. We can get the agency to get the deck polished. That way we have something clean to share. 7 slides max
1. Mission - reuse slide from QBR
2. Business Context, opportunities and threats- something along the lines of shape of the ecosystem
3. Key themes 2019 -2022 - Overview
4, 5. 6. Slide per theme
7. 2019 OKRs
Appendices for deep dives o

12.5.2018	Share 2019 Strategy Presentation w/ Leads. Define OKRs. Get buy-in on OKRs from each Lead. *After this date, Leads can share, evangelize strategy w/ their team. Feedback / questions can be addressed before presenting to team.*	
1.12.2019	2019 Strategy Presentation to BD team	

Approach:

- **Playwide -** We will build 3 year strategies by defining 10x goals three years out, and walking back to figure out what we need to get done in 2019. This is a significant shift, as we will first figure out where we need to be and then how to get there vs. where we are today and where we can be next year. So think BIG!
- **For our team:** This year we will NOT review individual team plans as a group - feel free to build them for your respective teams. Rather we will build common plans based on the relevant Play-wide themes. Our initiatives will be folded within those themes to ensure alignment with overall Play strategy. For example: Growth Consulting & goGlobal will all be part of the theme: More successful partners.
- **Some additions to Play-wide themes**: Our mission is below, and is based on three key pillars - Developer Success, Product Success and Brand Success. The relevant Play-wide themes map to our theme of Developer Success. Our planning will also include Product Success (as it goes beyond Play) and Brand Success.

What we need from you: Please take a moment to review the questions that have been selected to frame Play-wide theme. These are meant to be directional. Please add questions that you would like to discuss as part of our team strategy and plans. Please tag the questions

with your name. Additionally add ideas for low impact current activities to STOP & high impact ideas to START. See below.

Note: Only Leads should add questions & ideas below. Please get ideas from your teams (use this template if you like), but Leads should synthesize & prioritize top ideas in this doc.

FINAL THEMES:

Developer Success

- **Playwide theme: Diversified revenue growth (2-pager)**
  - Owners: Shazia, Kris, Chongsa, **Felix**, Niko, Moonlit & Sarah T (name in bold is primary owner)
  - Play Wide Theme: Doc | Deck |
  - Headcount Requested: 6 (2 for PlayPass, 4 for Loyalty)
  - Top Questions:
    - [Shazia, Kris] Are we organized to scale & run PlayPass globally?
    - [Chongsa, Felix] Are we set up to scale loyalty program? Is BD's role clear? Can loyalty be a value add for developers?
    - [Niko, Moonlit, sethomson] How much upside is there on our subscription business? Can games subs grow to 10% of game revenue? What needs to happen to make premium games viable?
- **Playwide theme: More Successful Partners** (Play BD Planning document)
  - Owners: Ricky, Lei, Gus, Nori, Anuj, Joanne, **Adam**, Darryl, Tamzin, Moonlit , Mary Liz, Sara T (name in bold is primary owner)
  - Play Wide Theme: Doc | Deck |
  - Headcount Requested: 11 for Growth Consulting
  - Top Questions:
    - [Ricky, Mary Liz, Sarah T] What is working well with our serv ice levels? What can we improve in 2019?
    - [Gus, Lei, Anuj, Nori, Joanne] How can we enhance our ability to identify high potential app and game developers and accelerate their growth to high impact thresholds?
      - Do the current HiPo marketing programs (Indies, SOA, Play Academy etc) provide a wide enough coverage for capturing new developers?
      - Do we have the right systems in place to identify which new titles have the highest potential?
      - In many cases we don't have resources to support startups or game devs making < $1M/m. Given this, how should we best support them?

Comment [3]: +Olivia Salva Hi Olivia, do we have any thoughts on how we're thinking about more successful partners from an engagement/retention standpoint?

Comment [4]: _Marked as resolved_

Comment [5]: _Re-opened_

Comment [6]: Sorry meant to reply! - Mike & Kirsten presented a deck about this at Purnima's meeting last week - can fill you in too on our regular engagement catch up and discuss...

Comment [7]: Great question. The Play theme focuses on Spend & MAU to define partner success. Do we need a specific question for engagement? I think we might, but wasn't exactly sure what to add. Open to suggestions.

        - [Adam, Darryl, Tamzin, Moonlit] What will growth consulting look like at the end of 2019?
            - What is the BDM's role vs. the Growth Consultant's role?
            - How do BDMs and GCs work together optimally?
            - How do we manage wide deltas in BDM's interest, aptitude and time dedicated to Growth Consulting?
            - How do we prioritize staffing?
            - How much would partner impact identification help? Do BDMs want an impact lead list?
            - How do we ensure robust tracking and impact attribution?
            - How will we know if we're successful?
- **Playwide theme: Gaming**
    - Owners: Eleanor, Felix, **Lei**, KH, Mike M, Tamzin, Toby, Dima, Iky, Yoshi, Nai Chang, Daniel, Vineet (name in bold is primary owner)
    - Play Wide Theme: Doc | Deck |
    - Headcount Requested: 3 (Premium Games: AAA + Indies)
    - Top Questions:
        - [Felix, Mike M, Lei] What is the latest w/ Developer 2.0 & earning the 30 from devs? How can we better leverage X-Google to support devs?
        - [Eleanor, Lei, KH, Nacho] Can we create a playbook to support PC/console devs not yet on Play? Are we doing enough across gaming verticals that don't monetize on Play? Specifically AAA & Hyper-Casual (ads-based).
- **Playwide theme: Next Billion Users**
    - Owners: **Olivia**, Mo, Daniel, Guy, Alex, Ryo, Kunal, Karan, Chi, Anuj (name in bold is primary owner)
    - Play Wide Theme: Doc | Deck |
    - Headcount Requested: 6 (Import BD - Note this includes Mature & EM markets)
    - Top Questions:
        - [Olivia, Mo, Daniel, Guy, Ryo, Anuj] What will Import BD look like in 2019? Depth vs Breadth? How will we prioritize staffing when we get less than the 6 heads requested? Does import work differently in EM vs Mature Markets?
        - [Kunal, Karan, Anuj] Review of the Go Big India Plan

- **Playwide theme: Play 2022: Store Vision + XFN Alignment**
    - Owners: Connie, **Karolis**, Andreas, Darryl, Terry (name in bold is primary owner)
    - Play Wide Theme: Doc | Deck1 | Deck2
    - Headcount Requested: 2 (Store Programs/Automation)
    - Top Questions:

- [Connie, Karolis, Andreas, Darryl] Product would like to see Smerch & pinning dramatically reduced in favor of algorithmically supporting partner outcomes. What would we need from the store to still work for our partners?
    - How can we align quality w/ store vision? Athena + Featuring reviews is out of sync w/ aQuality & pQuality. Will we have a new OKR to replace Athena?
    - How would we rank content in PREX if we had 100% control?
    - What is our ideal future of featuring?
    - Is our org support for Launch programs working well? Will it work in a Smerchless future?

- **Playwide theme: Trust & Safety (BD deck)**
    - Owners: Lisa, Parul, **Sarah K**, Mike F (name in bold is primary owner)
    - Play Wide Theme: Doc | Deck |
    - Top Questions:
        - [Lisa, Parul] How does SDK program align w/ XFN vision of trust & safety? How does SDK program impact the ecosystem long-term? How will we get there? What is BD role?
        - [Sarah K, Fyall] How can we better align w/ Policy team to protect users while supporting developers?
- **Playwide theme: Social Impact**
    - Owners: **Maxim,** Francesca
    - Play Wide Theme: Doc | Deck |
    - Headcount Requested: 2 (1 for Giving, 1 for Refugees/Literacy)
    - Top Questions:
        - [Max] What support is needed for Social Impact from non-dedicated Play BD team members? How can more people get involved? Is the goal brand equity or something else?

- **The most innovative platform for developers**
    - Owners: Steven M, **Mike F**, Kenneth, Raj A., Gavin (name in bold is primary owner)
    - Top Questions:
        - What are our anticipated top products to support for BD across Play, Android & Chrome in 2019? How should we decide what to support? What can we learn from 2018 challenges (Go, Vitals, Instant Apps)?
        - What is the ideal operating model to drive awareness & adoption?
        - Can we eliminate Athena as a BD OKR? Product adoption is...
            - Driven by Growth Consulting (when tied to biz impact)
            - Driven by Tailored Outreach (PS+PMM+BDOps+StratOps) for product adoption goals.

Comment [8]: Here's an early deck: https://docs.google.com/presentation/d/1YFn5kswiY2S0S9Dd8LB8XEDTTKUPRUWm6TmtUhYNS2I/edit#slide=id.g3e00b3e7b2_0_37

Comment [9]: App quality (e.g. user experience vitals, performance, etc) doesn't seem to fit here. These efforts are more geared towards user benefits. How do we fit it in?

Comment [10]: Moved to Play 2022. PTAL

Comment [11]: +Raj Ajrawat who will be covering in my pat leave absence.

Comment [12]: +Mike Fyall +Shannon Low

May want to pull in Swarnesh, Nuno & Alexi here. I know there is a pilot of Tailored outreach for managed partners going on for EMEA.

Comment [13]: will do. in 2019 tailored should go both up to top partners if EMEA successful, then down to unmanaged too

Comment [14]: Thanks Mike(s). The Alexi that Marchak was referring to is Alexey Kokin, i.e. [redacted]@.

- **Sustaining Positive Brand Equity**
  - Owners: **Dorothy**, Mike F, Stacia, Pat (name in bold is primary owner)
  - Top 3-5 Questions:
    - What are top learnings from DSAT? What trade-offs are worth making? Who are we surveying?
    - How do we communicate the value of Android & Play to developer ecosystem?
    - Protecting Android reputation in EU, LATAM & KR

Organizational Success

- **Playwide theme: Playing@the speed of light**
  - Owners: **Rashad**, Shannon (name in bold is primary owner)
  - Play Wide Theme: Doc | Deck |
  - Top Questions:
    - [Rashad, Shannon] Can we adopt best practices at driving OKRs from teams that find the process effective?
      - Has this driven real impact?
      - Do other regions have too many distractions?
    - [TBD] Do we have the support we need from other teams to best work w/ developers (DevRel, YT, GBO, etc).

APPENDIX:

[DRAFT] THEMES & QUESTIONS:

Developer Success

- **Playwide theme: Diversified revenue growth**
  - Owners: **Tamzin**, Brooke, Kirsten, Shazia
  - Play Wide Theme: Doc | Deck |
  - Top 3-5 Questions:
    - **New Models:** Besides Playpass, what other business models would evolve by 2022 to drive diversified business growth? What can we learn from PC/Console gaming and other businesses? Are we set up to support PlayPass as an org (reviews, analytics, BD, marketing, etc)?

Comment [15]: +Pat Correa

Are there headcount requests associated w/ Product or Brand success that we should include & prioritize here?

Comment [16]: For product yes, for brand no. The product asks have already been submitted via respective PAs. The only ones we're missing at the Play PA asks for DevMarketing - 2 heads being one for LATAM and one for IN.

Comment [17]: Would you mind sharing the HC requests that were submitted and for which PAs?

Comment [18]: +Stacia Conlon as I"m going to be flat out with Playtime, could you lead this planning stage with the first milestone being an initial SteerCo review 10/11?

Comment [19]: Just fyi. I can't seem to comment to this at the moment but yes I will pick this up.

- What does upside of our current subs business look like?
- What is the next evolution of subs? Bundles?
- Should we be more serious about games subs?

- **Commerce:** How could we support buyer acquisition on a Play level, through collaboration with partners / specific programs? How can we continue to grow GPB/Merchant accounts availability (CEE examples: Armenia, Georgia, Croatia, Slovenia) and in adding locally relevant payment options (Qiwi, MIR, Sberbank direct debit - for RU)?
- **Verticals:** In addition to organizing by Service Levels, are we placing enough strategic focus on categories that we care about in 2019? Does it make sense to cater consultations for those categories?
- **Earn the 30:** Should we spell out the services we provide developers for charging the 30% rev share. If you distribute to 10+ markets X%, if you use our billing X%. If you use 1Tb of data on updates, you pay $x.
- **User Diversity:** We discuss a lot about developer diversity and monetization diversity but does not look at user diversity in depth at a market level. Should we have more deep-dive analysis on Android adoption, user behavior, user engagement and monetization trend by age/gender group to leverage this insight to dev diversity discussion?

- **Playwide theme: More Successful Partners**
  - Owners: **Olivia**, Darryl, Kenneth, Adam
  - Top 3-5 Questions:
    - **Definition of Success:**
      - **For traditional partners:** Developers often think of success using . Is performance parity with iOS a goal? If not, how will we demonstrate our value? What is a better outcome? 100 devs making $10M/m, 1000 devs making $1M/m, or 10,000 devs making $100K/m? Should we have a broader definition of success , e.g. ads, e-commerce? Should success thresholds differ by market? The Play-wide group defined a metric for . Do those have meaningful blindspots across genres, markets, biz models?
      - **For non traditional partners:** How do we measure developer success, e.g. # of features used by apps? How do we define business success for partners, e.g. validation by Google, improved Android support, policy compliance, increase revenues
    - **Growth Consulting:**

Comment [20]: +Olivia Salva Hi Olivia, do we have any thoughts on how we're thinking about more successful partners from an engagement/retention standpoint?

Comment [21]: _Marked as resolved_

Comment [22]: _Re-opened_

Comment [23]: Sorry meant to reply! - Mike & Kirsten presented a deck about this at Purnima's meeting last week - can fill you in too on our regular engagement catch up and discuss...

Comment [24]: Great question. The Play theme focuses on Spend & MAU to define partner success. Do we need a specific question for engagement? I think we might, but wasn't exactly sure what to add. Open to suggestions.

            - What does success of Growth Consulting look like at the end of 2019? What is the we can bring?
            - How would we look at our business differently if we saw ALL Google revenue from our developers? Should we have a holistic view of developers, e.g. " " including distribution/acquisition costs?.
            - How can we become ongoing collaborators aligned with partners' ?
            - What can we do to help developers find the best ?
        - **Tools to Help Developers:**
            - How can we provide tools to help developers better the recommendations we give the, e.g. Firebase, A/B testing tool, price testing tool.
            - How do we enable developers to do quality self ?
        - **Success for Developers beyond Play:**
            - Should we help app developers reach users in a meaningful way given , e.g. Assistant, Home, next gen formats, even if Play is not directly involved?

- **Playwide theme: Gaming**
    - Owners: **Eleanor**, Kevin, Jamie Lee, Chongsa, Lei
    - Top 3-5 Questions:
        - **Google Gaming Strategy (One Google):** How should we invest and align w/Cloud, YT, Assistant, Hardware, Yeti, Daydream etc. and further Google's position in the Gaming Industry.
            - How do we deliver more value and help developers maximize the full potential of the partnership?
            - How do we either maintain control of the relationship or ensure all parties are working towards the same One Google goal/OKRs?
            - Community & ESports are becoming increasingly important for gaming, are we investing enough or should we be working more closely with YouTube.
        - **Multi/Cross Platform Play:** What is our plan and strategy to support multi platform games, from a business standpoint, infrastructure/analytics, and a developer tools offering?
        - **Defining Success:** How do we define success in 2019? Is there a global Northstar with which we can use to prioritize and align. How do we

measure if we're serving our developers well, if our launch strategies are working, and if quality is improving?
- How do we measure success of hyper casual and premium games?

- **Emerging Markets:** How should we best build up emerging markets? Should we work with large global players to invest and build up the user-ecosystem. Or do we invest more into local developers which may be slow to generate revenue.
- **Challenging the Status Quo:** How much are we willing to invest in forward looking initiatives which may introduce short term revenue risk, versus maintaining the current business?
  - What does digital wellbeing look like for mobile games and developers?
  - Should we make strike partnerships with external Gaming companies (Discord, Steam, Publishers etc)

- **Playwide theme: Next Billion Users**
  - Owners: **Karan**, Dima, Iky, [David or Daniel], Kunal
  - Top Questions: How do we...
    1. **Make Developers successful in EM**
       - Dedicated resources in EMs responsible for ensuring foreign titles land well in local market (localisation expertise, Merch prioritisation, translation services, tracking user penetration etc.)? What would resourcing and activity of those resources look like to do this well?
       - Provide export opportunity sizing for developers to EMs to prioritise appropriate resources?
       - Consider strategies beyond BRICs (e.g. SEA, EE, MENA) improving payments, support & merch in those markets?
    2. **Streamline Existing EM developer offerings**
       - Refine multiple, convoluted, non-complementary developer offerings (e.g. PWAs, Instant, Lite, Go, Project 50, etc) into a more cohesive solution.
    3. **Consumer Product Features**
       - Accelerate existing FOP penetration in EM
       - Create new EM product features (e.g. installment payments)
    4. **Consumer Marketing in EM**
       - Leverage the increased popularity of Play/YT in EM.
       - Educate EM users on Google products.

- **Playwide theme: Play 2022: Store Vision + XFN Misalignment**
  - Owners: **Connie**, Karolis, Terry, Mike M

- Top 3-5 Questions:
  - **Quality:** ~~What are our **quality** metrics and can we set an audacious goal for 2022?~~
  - **Store Identity:** Can we align across Play on Store identity? Is the Store developer-centric, user centric (or both)? How much should we lean toward automation vs. editorial? How much should we focus on content vs. collections? How does this aligned identity translate into product features/algorithms like PREX, Store look/feel, and programs like New + Updated? And, how do we ensure our definition of quality is maintained?
  - **Team Roles:** Ultimately, what roles should BD, merch, product, etc each play in executing on our long-term Store Vision? Within BD, are we set up to work most optimally/efficiently with the store and product teams?
  - **Off-Store Discovery:** Much of discovery happens outside of the Store -- how can we better engage gamers/users outside who do not regularly open Google Play?

Comment [25]: suggest to remove this, as it overlaps with other section on Athena

- **The most innovative platform for developers**
  - Owners: Steven M., Mike F.
  - Top 3-5 Questions:
    - **Product prioritization:** Which products will be most relevant across Play, Android, Chrome etc for our team to work on with partners (assuming we can't do it all)? Are we making the right investments today, based on this vision? E.g. How relevant with Chrome OS be for gaming in 2022? And which teams should drive product success -- can we rely on Product Specialists and Product Marketing?
    - **Simplifying narratives:** How do we keep products simple to understand and implement as platform and product/tool complexity explodes (Daydream, CrOS, Auto, Wear, Firebase, Android Studio, etc)? How can we better track whether our products are executing against their promised narratives?
    - **Disruptive technologies:** Are we aware of all potential disruptions to the Play distribution platform, e.g. blockchain -- do we have a strategy there? What is our strategy to empower devs through AI?
    - **Teams/implementation:** Which team(s) is best-placed to manage EAPs (DevRel vs. BD vs. product)? How can we better reach the thousands of unmanaged developers? We have thousands of touchpoints with developers annually -- can we be more efficient in helping product adoption? Should we think about partnering with competitors like Apple to change the industry tide around subscriptions?

- **What is the Theme Here?**
    - Owners: Dorothy, Stacia
    - Top 3-5 Questions:
        - **What brand do we want to be:** How do we want to position Play to users, developers, and internally to other teams within Google?
            - Users: How do users perceive Play? Play/Android vs iOS/Apple? Should we go further on Gaming? Where does Social Good and Wellness fit in within our brand?
            - Developers: Where do developers find value from Play (incl. tools) and where do they look to third parties?
            - Internally: Where does Play stand to other internal teams as we look to offer a more holistic offering (One Google for Gaming).
        - **Increase appetite for spend:** How do we unlock greater consumer facing brand marketing for both Play and Android? Can we grow Play/Android's brand to be more competitive with Apple in specific markets.

Organizational Success

- **Playwide theme: Playing@the speed of light**
    - Owners: Sarah K, Andreas, Steven M, Shannon
    - Top 3-5 Questions:
    - **Service Levels:**
        - Are Service Levels working? Do we need to make changes to our portfolio optimization model e.g different thresholds for EMs? Can we automate new rising stars identification to refresh portfolios throughout the year?
        - Ecosystem support seems secondary to saving BDMs time; is that the right prioritisation? How we can make BD-Ops more like nurturing vs. processing? What else can we do to jumpstart ecosystem support? Are there tech investments we can make to avoid just moving lower value work from FTEs to TVCs?
    - **Operations:**
        - 4 teams are involved in featuring reviews. Can we eliminate / automate one or more set of activities?
        - Is sharing support for launch programs across different orgs of BD, TechOps, StratOps & BD Ops slowing us down? Should all Ops teams be merged into one team to improve decision making, optimize roles and gain better alignment on team vision?
        - Ops teams HC growth is outpacing partner-facing BDMs. Does the BDM role become obsolete and replaced with Ops/PS outreach?

- **Decision Making**
  - How can we better utilize Steerco as a mechanism for faster decision-making on the topics that we need decisions on?
  - Is our decision making too democratic, resulting in outputs which are a compromise of trying to please too many people? Should we limit the number of people that are involved in making any one high-level decision?

- **Products**
  - PlayPass/CrOS; should these be supported by dedicated teams or leverage existing Ops & BD teams? How do we incorporate PlayPass & CrOS into our overall BD OKRs - unclear how these map to individual BDM work?
  - How does Play support Assistant, Search, Android (predictive), etc.?
  - How do we improve tools e.g. help center, to make them more actionable so we can reduce workload of BDMs/BD Ops?

- **Category Specialisation:**
  - What should Apps do to have a dedicated section in 2020 strategy, just like Gaming had here?
  - What role does category expertise play in the new structure? Recent org changes make category ownership appear as lower priority.

START:

STOP:

THEMES / QUESTIONS - BRAINSTORM

Developer Success

- **Playwide theme: Diversified revenue growth**
  - **Owners: TBD**
  - [Purnima Kochikar]Do we have the catalog to drive diversified revenue growth?
  - [Purnima Kochikar]Besides Playpass, what other business models would evolve by 2022 to drive diversified business growth? What can we learn from PC/Console gaming and other businesses?
    - [Moonlit Beshimov] We see an emerging trend of in-game subscriptions. It's still small ($34M in H1 2018), but fast growthing (+72% YOY). (In-game

subscriptions is different from Playpass, instead of a subscription bundle across games, it's designing a subscriber loyalty program per game, more similar to how subscriptions was an emerging business model for apps two years ago.)

- [Purnima Kochikar] How much revenue should we be willing to give up for diversity?
- [Michael Marchak] How much upside do we have on our subscriptions business? Will it continue on triple digit growth for the next 3 years? What else can we be doing?
- [EMEA]
  - Tamzin Taylor How can we better forecast addressable market for developer segments in order to know when market saturation is coming & be able to mitigate risks (eg slowing in subs $)? E.g. music market in USA + [tamzintaylor] How might we get a better grasp of the relationship between device class and revenue/engagement opportunity to aid BDM & partner understanding of (geo & segment) market opportunity, targeting & reporting? + [schroeer] In mature markets some early signs of user saturation can be observed (very slow install growth). How do we ensure the "tide keeps rising" for everybody?
  - [Tamzin Taylor] How might we grow a healthier & diverse ecosystem by rewarding engagement driven from curators by giving rev share on ads/GPB, utilising YT whitelabel embedded player (originally "player for news publishers")? E.g. creator's get % of ad revenue from the playlists they create (incentivising quality UCG) ala free-tier spotify, or neverthink for video)
  - [Tamzin Taylor] How might we get payments to prioritise and dramatically speed up local FOP unlocking to help our GPB story by when it's needed? + [akokin] We've seemingly slowed down in making GPB/Merchant accounts available in different countries and regions (CEE examples: Armenia, Georgia, Croatia, Slovenia - representatives of these regions actively asked us for support) and in adding different, locally relevant payment options (Qiwi, MIR, Sberbank direct debit - for RU) - can we reverse this trend? + [jakobkalbfell] How could we support driving FOP and Paying User acquisition on a Play level, through collaboration with partners / specific programs?
  - [adih] Is revenue our top OKR? if so, how do we make sure we have a clear plan for revenue growth in lower tiers ($100K & $1M) and not focus mainly on top developers? + Alasdair McMaster , Ignacio Monereo What does success with Indies look like in these terms?
- [LATAM]
  - [Carol, David Pons] What is the next evolution of Subscription? Bundles are very attractive to customers. How can we let developers partner to

Comment [26]: This should move to More Successful Partners

Comment [27]: +1

offer discount on bundles and increase Play revenues? Or offer one subscription for several apps?
  - [Daniel Dulitz] Brazil is a top country for Netflix and Spotify, people are used to subscription models and on paying through monthly installments. Are we considering Brazil as a testing ground to pilot Playpass ?
  - [Carol] Diversified Revenue can come from very niched apps/games. How can we work with those developers and make sure to help them grow? How to promote them on Play to the correct audience? + [[Albert Reynaud] 'EMEA] How can we better capture ephemeral revenue/engagement (events, buzz, worldcup, elections, news, etc)?
- [US]
  - [Brooke Davis] How can we continue to focus on revenue when we don't have the **policy to enforce** partners to comply? How do we avoid more Netflix scenarios? [Mary Liz McCurdy] How do we **future proof** our Play Billing business, to ensure partners are thriving on Play, rather than circumventing the platform to avoid fees?
  - [Sarah Karam] What are realistic **benchmarks** for diversification? [Mary Liz McCurdy] What does a healthy **breakdown** of revenue diversity look like divided amongst apps, games and DC by 2022? [Nick Montaperto] How do we stay ahead of the business model innovation curve to adequately capture value when we are creating it with new technology?
  - [Ashraf Hassan] [Kirsten Rasanen] edit] As a business with significant revenue, it is naturally that we are becoming somewhat **risk** averse. How can we overcome this aversion to make bold bets?
- [TechOps]
  - [Mingoo Kim Ken Liu Steven Tepper]: In addition to organizing by Service Levels, are we placing enough strategic focus on categories that we care about in 2019? Does it make sense to cater consultations for those categories?
  - Kris Resellmo Cheryl Jones Are we investing correctly within the BD Portfolio? What are the blind spots within our Portfolio? Are we "over-helping" certain developers (e.g. we review more apks per partner. the higher the tier gets) and possibly neglecting others?

Comment [28]: Move this to section on service levels.

- [StratOps]
  - [Olivia] Is Go Global actually hurting revenue diversification for Play? Are we making bigger devs bigger? Is it even a concern?
  - [Felix] Are we able to create incremental revenue or do most of our efforts amount to shifting spend from 1 developer to another? Is GC incremental or is it the same?
  - [Darryl Huie] Earn the 30? Should we spell out the services we provide developers for charging the 30% rev share. If you distribute to 10+

markets X%, if you use our billing X%. If you use 1Tb of data on updates, you pay $x.
    - [Darryl Huie] How would we look at our business differently if we saw ALL Google revenue from our developers? Should we have a holistic view of developers?
- [KR]
    - [KH] What are real revenue growth opportunities(or low-hanging fruit) for non-game apps and how are we able to realize? And what do we need?
    - [Jamie Adams]Are we going to capture other metrics(Ads) to measure the diversification?
        - [Jiwoong Lee] How can we make all play developers monetize with minimal efforts?
    - [Jihyun Chung] New value proposition of play billing as a structured offer to the developers? When you make X on Play, you get Y support on the billing related promotions.
- SEA
    - [David Yin] Will blockchain disrupt our Play distribution platform? Will mobile app developers/publishers be able to distribute their content for free over blockchain?
    - [David Yin] How do we reach out to the thousands of unmanaged developers in SEA in a scalable way? Can we leverage on Play Academy in this regard and work closely with the XFN developer facing teams?
    - [Kanan Rai] How do we enable local app categories to be built, to get users visiting more often, downloading more apps, and hence looking at Play as a primary source of entertainment instead of a transactional app download location? How do we solve the problem of lack of initial scale and hence lack of quick revenue success for any experimenting developers?
- JP
    - Do we have enough user segment to have revenue diversity especially in Japan?
    - [Evan Kojima] How can we provide more developer-friendly development environment where partner engineers can support a diverse number of different devices with different specs and screen sizes, which will eventually lead to closing the app quality gap against iOS.
    - [Evan Kojima] What KPI/metrics should we have for our justification to support non-profitable partners (e.g. big partners from commerce, travel, lifestyle, etc.)?

Comment [29]: +1

Comment [30]: +1

- [Chongsa Kim] We discuss a lot about developer diversity and monetization diversity but does not look at user diversity in depth at a market level. Should we have more deep-dive analysis on Android adoption, user behavior, user engagement and monetization trend by age/gender group to leverage this insight to dev diversity discussion?

- **Playwide theme: More Successful Partners:**
  - **Owners: TBD**
  - [Michael Marchak] What does the future shape of our ecosystem look like? How can we 10X the number of successful partners by 2022? [Kirsten Rasanen | How are we defining 'success'? + [Dmitri Martynov EMEA] How do we define/measure App Developers' success? Context: if we want "More Successful Developers" what would define a success for Apps Devs (outside of revenue in non-Play revenue use cases such as e-commerce)?
  - [Purnima Kochikar] Which is a better outcome - 100 devs making $10M/m, 1000 devs making $1M per month, or 10,000 devs making $100K per month?
  - [Michael Marchak] How much impact have we driven in Growth Consulting in 2018? What does success of Growth Consulting look like at the end of 2019? Should we be more targeted w/ Growth Consultations (to drive diversity, to drive max impact)? + [Niko Schroer /EMEA] As a team we moved from "featuring pipelines" to business consultants with QBRs etc. What are the next set of insights we need to bring to devs to continue to be business influencers of the mobile economy elite? + Albert Reynaud /EMEA] How can we find tools that help developers better test and measure the recommendations we give them. (Access to Firebase, A/B testing tool, Pricing Testing tool, etc)
  - [EMEA]
    - [Ilky Sandorffy] How we can help developers in nascent markets (pre-emerging) leverage global opportunities on Play (ie become successful exporters?)
    - [Ilky Sandorffy] Total revenue consulting - is there room to partner with ads teams to better consult developer on total revenue opportunity - including information about distribution cost? + [Niko Schroer | It could be argued that Android's and Play's strategic importance to Google > Play's revenue in itself. What can we do to help developers find the best business model to build sustainable companies beyond our own focus on subs/IAPs/ads?
    - [Jakob Kalbfell] Are we aware of developer sentiment towards the opportunities they perceive for the next x-years as well as what partners believe is hindering them and how we could help them overcome this? (user research driven)
  - [LATAM]

Comment [31]: And at the other end of the spectrum, are there more ways to scale GC efforts for CORE + indie devs with GC "lite"?

- ■ [David Pons] How could we add the subscription-specific monetization metrics in the Growth consulting tool? (today "only engagement, retention, etc are available)

Comment [32]: +David Pons

Don't we have a subs module in Biz Reviews? Are you thinking of something deeper?

- ○ [US]
  - ■ [Brooke Davis] How do we ensure we're partnering with new services early on versus being an afterthought? Seems like "**iOS first**, followed by Android" was a recurring theme this year. [Mary Liz McCurdy] Developers often think of success using **iOS as a benchmark.** Is performance parity with iOS a goal? If not, how will we demonstrate our value?

Comment [33]: +[Brooke Davis] Can you give a few examples?

Comment [34]: The Skimm, Adobe Rush, Fortnite, Super Mario Run,..
+[Mary Liz McCurdy] as i recall there being some health/fitness apps that launched iOS first?

Comment [35]: Peloton is iOS first

  - ■ NON-TRADITIONAL PARTNER SUCCESS: [BD Ops] How would we **measure Ecosystem developer success**, are number of appropriate features used by apps the right metric? [Parul Soi] How do we **define** business success for 3P SDK developers? Validation by Google, improved Android support, policy compliance, increased revenue?
  - ■ [Product Specialists] What else can we **offer** to our developers to help decrease churn and increase free to paid conversion? + [Carol Soler /LATAM] How do we partner with developers to prevent involuntary churn?
- ○ [TechOps]
  - ■ Kris Resellmo Kenneth Lui Kei Kawabata : How do we become on-going collaborators with partners more closely aligned with their development cycle, rather than centering on our featuring cycle and opportunities?
  - ■ [Mingjoo Kim, Cheryl Jones, Kris Resellmo] : How can we offer our range of review services to more (qualified) partners without being constrained to the featuring nomination cycle? (e.g. we are starting on a small scale with UX Consultations)
  - ■ [Cheryl Jones] Are we placing enough bets and resources on Indie developers and startups (BD as a whole, not just TechOps)? What is the right level of investment to help indies become more successful, and how can we measure success differently vs. more established players?
  - ■ [Kenneth Lui] How do we better align our review resources with how titles are visible in the Store (e.g. PREX)? Related: How do we make sure reviewed titles are consistently fed into PREX clusters?

Comment [36]: Connie Kim@google.com should this move to store 2022? see also ricky's comment below that it seems to already be in place

Comment [37]: As per the new PREX algo, this is happening by design.. see this for details: https://docs.google.com/document/d/1fVxEHa5mwL1YcQsiPUeGpNk-uznwZPQAHJnnoDtqlol/edit#heading=h.y6179q3w544v

  - ■ Kris Resellmo Kenneth Lui : How can we measure and tie success of partner to specific TechOps feedback, and in turn use that information to focus our review recommendations to other partners?
  - ■ Kenneth Lui Steven Tepper Should we consider utilizing signals from vafs as part of our quality score? Related: Do vafs include question about wellness? If not, should it?

- Kenneth Lui What can we do to enable more partners/developers to do quality self assessment and troubleshooting? Can we invest in tools (either internal and external) that can help?

- [StratOps]
    - [Terry] How do we reward and celebrate partner success? Historically we had Android Excellence to reward high quality. E.g. Can we create a Google Top Picks youtube channel to celebrate high quality games in Indie Corner?
    - Multiple questions below about supporting a broader definition of success than games that make money on Play & success thresholds based on US expectations.
    - [Connie Wilson] Which segment of developer do we want to help the most? Which segment do we have the power to help the most? If we want to identify the group of devs that sit at the intersection both these segments, is this possible? And what parts of our business should we change to better support these devs?
- SEA
    - [Guy Charusadhirakul] Are we helping partners reach users in a meaningful way given that there are more surfaces than ever (e.g. Assistant, Home, etc.) and these are surface/areas where Play is not directly involved with? This is especially relevant for apps.
    - [Guy Charusadhirakul] Are we doing enough to support local developers? While large/global developers drive a lot of spend, how else can we support local developers on the store & promotions?
    - [Kanan Rai] Policy is one of the key challenges for partners: what can we do to improve the policy processes and bridge the knowledge gap?
    - [Sharan Tulsiani] How can we look at "managing" Partners differently to effectively focus on riskier but multiple 'X' future growth bets vs legacy ad-monetizing Partners that are unlikely to change?
    - We measure developer success by revenue, but keep our lens focused on IAP revenue. Can we be more holistic to also include ads so we help them build a more holistic business, instead of pushing everyone to chase an IAP model? Would this help us help them better and in a less biased manner?
    - Play Policy's warning and enforcement processes can be inconsistent and lack clarity (previously fixed issues are suddenly declared un-fixed / different elements of the same policy actioned upon at different times leading to inefficient engg work at developers to fix / non-specific communication etc.). How can we create a policy environment that protects our users, yet keeps developers happy so they can focus on building better apps and on consumer experience?

Comment [38]: Seems more suited to "keeping our users safe" which is a theme we don't have in this doc

- How can we help developers gain benefits for what they built and better protect them from issues like IP infringement, impersonation etc?

- JP
  - How can we define dev success with Play BD effort?
  - [Evan Kojima] Now that partners are equipped with methods (devices including web, app, wear, auto, etc. assisted by AI) to encompass their users' life, we need to acquire broader perspectives so that we can gain trust from partners as someone who can consider how they should develop such holistic UX.
  - [Evan Kojima] We should be ready to support our partners in their transition/expansion of their service toward the next-gen format after mobile apps. Regardless of the format, the business scheme in which service providers offer some kind of value/service to consumers wouldn't change.

- **Playwide theme: Gaming**
  - **Owners: TBD**
  - [Michael Marchak] Should we invest more in a One Google approach for game developers? There seem to be interesting alignment points w/ Cloud, YouTube & Assistant (others?)? This is something Jamie has asked about.
    - [Dan Song] +100, think this is critical, especially as x-platform gaming becomes more popular and complex. We need to make it easy for any dev to see & harness full potential of partnership with not just Play, but Google overall.
    - [KH] +1, hardware PA could be one we can work together
    - [Chongsa Kim] +1
    - [Moonlit Beshimov] +1 Also Yeti, AR, Enduro
  - [US]
    - [Adam Gutterman] Strategic partners such as Blizzard, Bethesda, and 2K are becoming multiplatform developers, publishing a single SKU on as many as 7 platforms (Windows, macOS, PS4, Xbox, Switch, iOS,
    - [Andreas Preuer] Should we allocate resources to games content acquisition. Multiplatform developers and indie segments seem to be opportunities.
    - [Dan Song] What is Play BD's global gaming northstar? And how do we work across regions on the highest value initiatives? For instance, potential list of hot topics (many already described below by other team members) - is the BD team invested optimally against these? How would we rank this list? Anything missing?
      - Lion Force
      - Digital Well Being

Comment [39]: pls see also our thoughts from EMEA on this opportunity (scroll down to "EMEA", first bullet)

Comment [40]: +[Michael Marchak] Most of this bullet got clipped. Can you restore?

- Lootboxes
- Gaming tech: High Fidelity Gaming; Streaming
- Diversity - Go Global / Indies / Genre
- LiveOps
- Loyalty program
- Subscriptions (both Play Pass and Industry-wide subs trend)
- Chrome OS / Pixelbook gaming
- Buyers project/ store offering
- Merch experiment/ segmenting out new games

- [Ashraf Hassan] What do we think about revolutionizing the gaming industry and disrupt it? Is the revenue and impact worth a risk? If so, should we start exploring new gaming opportunities (eg Cryptokitties)?
- [BD Ops] Which game developers are we serving well? Which ones are we not?
- [Sarah Thomson] How can we, in general, starting weaving proactive goals and initiatives into our gaming strategy, while maintaining a balance with our current games business? ie:
  - strike a partnership, acquire Discord
  - Partner with Steam
- [Eleanor Park-Otsu] What is the right balance between forward-looking strategic initiatives versus managing/maintaining/sustaining the current mobile gaming business? How can we apply resources more appropriately to get ahead of opportunities instead of facing a trade-off to growing the existing business which may have a cap due to user and market saturation?
- [Moonlit Beshimov] Where do we think mobile gaming and gaming in general will be in 2022? What's the next big disruption/innovation? What's Google's role? What's Play BD's role? Knowing that, when and how do we prepare our team to get ahead of the change, per Eleanor's comment?
  - What's our thought on interactive streaming, ie. Mixer.com for mobile?
- [Moonlit Beshimov] What does excellent digital wellbeing look like for mobile games? What's our stance and messaging to game developers? To users? Are we willing to make a short-term revenue trade-off for long-term sustainable growth (revenue & engagement)?

○ [EMEA]
- [Tobias Knoke, Alexey Kokin] How do we ensure that we keep control of strategic platform relationships (that is, not becoming the carrot of GBO teams) in potential One Google approaches? + [Ignacio Monereo, Alexey Sobolev] what is the leadership view on collaboration with teams such as Daydream (VR/AR) or Yeti? How do we partner with these teams, how do we support these

Comment [41]: +1

Comment [42]: +1

new platforms, and how do we work with our developer partners in relation to these platforms? (shared OKR's?, independent teams?) + [Tobias Knoke, Dmitri Martynov] Do we need to partner internally/with product on cloud streaming for mobile gaming?
- [Tobias Knoke, Andreas Preuer] Is our current tentpole process of estimating success of products in a very dynamic industry the right approach or should we try to be more flexible with Merchandising and Performance Marketing pillars to amplify successful mobile games in the short-term?
- [Tobias Knoke] What is our business development strategy and developer tool offering for cross-platform games as we can expect more of these titles in future, potentially driving significant revenue and developer success? + [Tamzin Taylor] And how do we ensure we have visibility into such data (eg none today on x-platform product firebase)
- [Ignacio Monereo] Moving beyond install in Play: instant games + app bundle +side loading - how Play continues to be relevant in the world where players can play games without clicking install in the store and hence devs rely less on featurings/ecosystem
- [Alasdair McMaster] What can we do better to support premium game developers both pre and post launch?

- [LATAM]
  - [Daniel Dulitz] Given that LATAM scenario for Gaming is very different from mature markets (i. E. Consoles and PC's pretty expensive) and mobile pretty prevalent and with the user base getting more capable of playing beefier games (i.e. Garena). How can we reproduce and create more cases like Clash Royale and Garena in a region that is usually seen as hard to monetize, but offers a fertile ground for mobile?
  - [Daniel Dulitz] According to Newzoo, Brazil and Mexico rank as #3 and #4 in terms of audience for eSports been only behind China and US, how can we take advantage of this using Play in synergy with YouTube ? What are the initiatives that we are doing worldwide to support eSports through Play? (in Brazil we are experimenting with an engagement hub) + [Dan Song] +1 - I'd suggest even considering an Google Play Esports Commissioner / team to drive esports-specific deals and partnerships
- [TechOps]
  - [Kris Resellmo, Steven Tepper] Can we utilize the product feedback cycle specifically around gaming with dedicated resources (e.g. a Gaming PM) to understand why certain developers are deciding to launch on non-Android platforms first?
    - [Moonlit Beshimov] +1
  - [Kenneth Lui] How do we define game quality? Can we establish defining qualities by genre instead of generic quality guidelines. E.g. what does

quality mean for Casual vs RPG vs Racing games? How can we test for them?

- [KR]
  - [Jamie Adams] How do we plan to support cross/multi platform games that may not fall under our support criteria or procedure? I.e APK size far bigger than our OBB mechanism, mobile app utilized only for payment whilst gameplay is done on PC/console (Nexon's FIFA case)
  - [Jiwoong Lee] How solid is our refund policy in 2018 context? Developers observe Google/Apple's refund policy (specifically friendly fraud) is being abused by users as a way of seamlessly quitting game and moving to another ones. Given the user behavior, do we need to provide an official way for users to transfer the asset value from old games to new one, and do we need to revisit our refund policy?
  - [Jamie Adams] How do we plan to support and measure the success of hyper casual games (no IAPs)? Can we categorize them into catalogue diversity and be measured by non revenue such as installs?
- SEA
  - [Guy Charusadhirakul] Are we doing enough with regards to the community aspect of gaming? Most of the popular games today are multi-player, social games.
  - [Guy Charusadhirakul] What is our strategy towards casual games? Store and a lot of internal projects are geared towards mid/harder-core games while still millions of people are still playing and engaging with casual games.
  - How are we planning to work better across our O&O properties (YT, GCP) to co-develop the gaming industry?
  - How do we work with large global players with the muscle to invest in markets to grow the gaming ecosystem in India?
  - Should we invest in efforts by local developers to create local themed games content which may take time to gain monetizable traction but is important for ecosystem growth?
- JP
  - What is entire Google Gaming strategy direction (incl. Yeti, YT, Cloud)?
  - [Chongsa Kim] How can we make mobile gaming even larger amplifier for the entire gaming ecosystem? It is true that mobile contributed significantly to the gaming industry to increase the number of gamers but it's not well-connected with other major Console/PC platforms that many of our core users are also engaged with. While understanding multiple challenges such as policy and competition, is there any out-of-box partnership opportunity that we work more closely with these non-mobile platform players to make the better x-platform gaming experience for users?

        - [Chongsa Kim] Community is getting more and more important than ever for gaming but it's very fragmented and tough to manage efficiently. Should Play make community management feature for game devs or should we rather work more closer with YouTube, Google's existing globally popular community service.

- **Playwide theme: Next Billion Users**
    - **Owners: TBD**
    - [Michael Marchak] We've talked a lot about the need for dedicated import support, particularly in Emerging markets. How do we make this happen in 2019? [brooked] IDEA: Can we have **local market experts** on a category basis advise developers as they enter new countries?
    - [EMEA]
        - [Alexey Kokin] Most of Next Billion strategies revolve around major markets like India, Brazil and BRICS nations overall - shouldn't we also have a strategy, plan and roadmaps for smaller nations in EE and MENA, for example? Making support, merchandising and payments available in these regions? + [iky] How resource intensive would it be if we are to start custom store merchandising in every single market we operate in? Would it be worth it?
        - [Dmitri Martynov] Next Billion users are often associated with Import-side initiatives while import to Next Billion is actually an Export from other developers markets. Would it be more efficient to focus on Export side to drive Import in Next Billion countries?
        - [Dmitri Martynov] Should we have a revenue opportunity sizing for Next Billion countries in order to consult our partners to allocate appropriate resources?
    - [LATAM]
        - [Carol Soler] How do we enable emerging markets specific strategy to our products so we can better adjust to markets singularities (e.g. Installments in BR)? And how do we create products that are not US centric and easily adaptable to other regions/market needs? + [Carol Soler] How to make a Global business scalable having local flavor and respecting regional preferences on how users want to consume apps/games?
        - [David Pons] How to work with / convince Android Team to include Emerging markets when launching high end products to compete better on HVU (Pixel devices, ATV devices, etc)
        - [David Pons] How we can speed up the expansion of FOP in region? (local credit card and debit card, IMALI) +[Daniel Dulitz] There is a huge effort on delivering new FOPs to emerging markets (DCB, Gift Cards, Pin on

Receipt, IMALI), but very little effort / investments on communicating that these exist to the local users. Is there a plan to invest more on communicating these in the future? Is there a co-marketing budget that we can tap? + [dpons] How can we automate tracking of FOP-related promotion results that include devs

- [US]
  - [Sarah Karam] Can we **narrow this down** more to have more significant impact on our goals?
  - [Mary Liz McCurdy] How can we **streamline** our convoluted developer offerings which do not complement one another (e.g. PWAs, Instant, Lite, Go, etc) and take a more cohesive solutions approach to success with NBUs?
  - [Jeena Merina] Should we **work more closely** with the Google NBU teams and/or teams who are looking at building/enhancing infrastructure in the market to facilitate growth in NBU?
- [StratOps]
  - [Olivia] Given the many NBU offerings (e.g. EMR checklist, Android Go, Instant, App bundles), how can we identify what is the right solution for each market x developer in an emerging market?
- [TechOps]
  - [Ken Liu] Are we prepared to invest more resources in top emerging markets in 2019 where we are currently under-resourced? . i.e. BR, MENA, ID, MX, IN
  - [Ken Liu] Can we accelerate our focus and efforts on local champions in emerging markets, e.g. programmatic incubation?
- SEA
  - [Kanan Rai] How are we leveraging the growing popularity and engagement of YouTube for Google Play in emerging markets?
  - [Kanan Rai] What are our investments to help users in emerging markets understand our products and offerings ?
  - [Kanan Rai] How should we think about balancing revenue metrics with localization and discovery in these markets?
  - [Sharan Tulsiani] Can we build Managed cohorts of Indie/Small game dev bets to accelerate growth and grow the torso?
  - [Sharan Tulsiani] Could we re-categorize gaming users in India away from Developed market categories such as ‘mid-core’, ‘hardcore’, etc (inherited from PC) and think ground up from an India/EM perspective of how gamers view themselves (ref. learnings from immersion 2018)
  - [Sharan Tulsiani] What role can we play in building Gaming communities/tribes to drive more social acceptance in game spend - similar to fashion (perception, tribal), movies (social, perception, tribal), group activities (social, tribal)

- How do we make the store a lot more intuitive for ALL of India - enable language support without having to change device language, intelligent English+vernacular hybrid translations etc?

- **Playwide theme: Playing@the speed of light**
  - **Owners: TBD**
  - [Michael Marchak] Are A/G/C/E Service Levels working? Do we need to make changes in 2019? What changes do we need to incorporate into our portfolio optimization model or process? *[Goal is to complete portfolio optimization by End of November]*
  - [Michael Marchak, Andreas Preuer] What does the future of our Launch (aka "Store") programs look like?
    - What would happen if we stopped all pinning on the store? Is the savings in BD time worth the trade off? Could we improve the ranker for Smerch to reduce any negative impact (or even to drive a more positive outcome)?
    - Why do we spend so many review resources on lower visibility Merchandising collections? Should we be reviewing higher visibility PREX titles & improving the quality of apps on Play overall?
    - Is our org, sharing support for launch/store programs across BD, TechOps, StratOps & BD Ops slowing us down? Are roles & responsibilities clear & optimized?
  - [Michael Marchak] Is it best to support PlayPass w/ a dedicated team? Or should we leverage existing operations & BD teams? How will the dedicated model scale?
  - [LATAM]
    - [Carol Soler] How do we improve our tools, such as help center, with more actionable/step by step instructions so developers can rely on it and take the weight off of BDMs/BD Ops?
    - [Daniel Dulitz] Usually Play BD + BD Ops works with roughly the top 1% of the developers (10k) from Play, but developers from LATAM are usually very small and the majority of them does not make through this cut to be considered ecosystem. How can we be sure that Global metrics are inclusive of emerging regions ? And also, how we can make BD-Ops feel more like nurturing than processing ?
    - [David Pons] How can we automate the finding of new (partners) rising stars to refresh our portfolio?
  - [US]
    - [Brooke Davis] How are programs / platforms like PlayPass & CrOS incorporated into our overall OKRs? It's unclear how these efforts map to **individual BDM work**

- [Brooke Davis] What role does **category expertise** play in the new structure? Recent changes make category ownership appear as lower priority
- [Mary Liz McCurdy] łow much do we care about **the Store as a primary user destination**? If we are betting on the store as a primary destination, are we making the right investments to drive that kind of aspirational behavior? What can BD do to help?
- [Product Specialists] How does Play support the Assistant, Search, Android (predictive), etc.?

- [StratOps]
  - [Connie Wilson] Should ops be consolidated under one team?
  - [Connie Wilson] Steerco seems to be working well, but yet we still have this (velocity of decision-making) as a focus area for 2019. (How) can we better utilize Steerco as a mechanism for faster decision-making on the topics that we need decisions on?
  - [Darryl Huie] BD Ops has the primary goal to save BDMs time.
    - Is shifting from one set of humans to another the long term goal? Are there tech investments to address this problem upstream?
    - Ecosystem support seems secondary to saving BDMs time. Is that the right prioritization? What else can we do to jumpstart ecosystem support?
- [TechOps]
  - [Kris Resellmo] We still have 4 teams involved in featuring reviews (BD, BDOps, TechOps, Merch). Can we eliminate / automate one or more set of activities?
- [JP]
  - Regional team often lacks technical support resources and we spend lots of time for troubleshooting technical issues when there's a bug in product, etc (e.g. Gift Card Sprinkles campaign). DevRel is definitely a great resource of support for us but they are also very resource constrained. Just like other Google organizations (GBO, Android), should Play business team create gTech like dedicated partner tech support team who helps technical works that DevRel cannot or is not supposed to support? (e.g. troubleshooting for Gift Card campaign, OOAP integration support for Loyalty Program)

- **Playwide theme: Keeping our users safe**
  - [Purnima Kochikar] How should we set up the 3P SDK program to scale and have impact?
  - [US]
    - [Parul Soi] Can Google Play completely **restrict** certain Android APIs and features for apps distributed to protect user privacy and security?

- [Sarah Karam] How do we measure developer & BD **impact** on this goal given it's user facing?

- **Playwide theme: Play 2022**
  - [EMEA]
    - [Alexey Kokin, Tamzin Taylor] What should Apps do to have a dedicated section in 2020 strategy, just like Gaming had here?
  - [US]
    - [Brooke Davis] The # of horizontal teams is outpacing the growth of BDMs working with partners. Does the partnerships role become **obsolete**? Replaced with Ops and product specialist outreach?
    - [Brooke Davis] How can Play **partner with Apple** to change the industry tide around subscriptions and get users accustomed to paying for services outside of entertainment?
    - [BD Ops] What shape of the ecosystem will we aspire for in 2022?
    - [BD Ops] What are our **quality** metrics and can we set an audacious goal for 2022?
  - [StratOps}
    - [Terry] Do we have alignment across Play on product identity? Is the store developer centric or user centric or both? How do we translate our identity into product features/algorithms and partner programs etc.?

Comment [43]: Move to Speed of Light section.

PRODUCT SUCCESS

- **The most innovative platform for developers**
  - **owners: Mullers, Fyall**
  - [Purnima Kochikar] which products would be relevant in 2022, why? Are we investing enough in them today? For example: How relevant will CrOS be for gaming in 2022? Are we investing enough today?
  - [Purnima Kochikar] Can we rely on Product Specialists & Product Marketing to drive Product Success? Is Athena still a needed target for BDMs?
  - [Michael Marchak] How does Chrome OS fit it? Is it another platform to drive adoption? Or something we need to start doing growth consulting on?
  - [EMEA]
    - [Alexey Kokin] In 2018 only Vitals among all Quality topics got enough attention, support and resources from product. Android Excellence was doomed for failure due to complete neglect in terms of Play visibility, Top Developer is gone, the idea to make Athena info and data available to developers never took off. Do we honestly care about quality? Does Athena accurately represent the concept of quality which we care about? +[Adi Haddad] What is App Quality for games? Is it meaningful/necessary?

        - [Alexey Kokin] Apple won users' hearts by their marvellous, but less functional, App Store redesign. We had a lot of discussions, mockups and bold ideas back in 2017 which were not implemented - and current Play application looks are dated. Should we go for redesign?
        - [Niko Schroeer] The store remains our most important tool towards devs and it runs a lot on automation (vs. editorial). IMHO it does not work very well (For almost 10 years I´ve been giving Google *all my info* and recommendations are still way off). Should we push Merch PM stronger towards editorial and consequently focus on partners we (BD) have deemed as high quality/ relevant/ rev potential etc.?
        - [Niko Schroeer] For subscriptions, Google Play Billing has made huge steps forward over the past 2 years. It's actually a great billing solution now. How might we push it to become *the best* billing tool kit in the market - so good that devs happily pay rev share?
        - [Jakob Kalbfell] How can we potentially show content rather than brands / products in our store and hence make it more vivid?
        - [Iky Sndorffy] Off-store discovery (alley oop?) The majority of discovery happens outside of the store - how can we better engage gamers/users outside who do not regularly open Google Play?
    - [US]
        - [Steven Muller] In a world where not every product is considered an equal, how do we gain clarity of vision from leadership on which products across Play, Android and Chrome are most important for our managed partners to work on? (they can't do them all :))
        - [Sarah Karam] How can BD better **track product**-market fit at scale in the months/years following launch? I.e. whether our products are doing "what it says on the tin"
        - [Nick Montaperto] How do we keep products **simple to implement** and understand as platform complexity explodes (Daydream, CrOS, Auto, Wear, etc.)?
        - [Jeena James] Can we take a stab at an app development **narrative** across Firebase, Android Studio and Play product/features?
    - [SEA]
        - [David Yin] Can blockchain disrupt our Play distribution platform? Will mobile app developers/publishers be able to distribute their content for free over blockchain and disintermediate Google Play?
        - [David Yin] How do we reach out to the thousands of unmanaged developers in SEA in a scalable way? Can we leverage Play Academy in this regard and work closely with the XFN developer facing teams?
    - [StratOps]

  - [Darryl Huie] Why are EAPs managed by PlayBD rather than product teams <> DevRel?
- [TechOps]
  - [Cheryl Jones] Diversification of revenue to me also implies diversified portfolio across platforms. How can we follow up on EAPs for new platforms/features to keep the momentum going for those platforms? I think it would involve closely collaborating with product specialists and BD ops to do outreach to relevant devs to gauge interest for developing for the newly released platforms, or keeping existing ones going.
  - [Kris Resellmo] We have thousands of touchpoints with developers yearly. Could we be more efficient in helping product adoption? While we have tried simple "you should implement N" suggestions, can we enhance that with growth consulting data to finish reviews with an "upsell" for future interactions?
- [JP]
  - [Chongsa Kim] What is our strategy to empower devs through AI?

BRAND SUCCESS

- **Theme**
  - **Owners: Dorothy, Stacia**
  - [EMEA]
    - [Tobias Knoke] What brand do we want to be and what do we need to be to fulfill our mission?
    - [Dmitri Martinov, Alexey Sobolev] Play as a Gaming brand looks obvious ("play games"). Do we want to position Play as a gaming destination?
    - [Alexey Kokin] Do we have a clear understanding and cross-team alignment on how our payment systems will be called and how they will be working together? We have some good synergies with Pay and Play Billing, but with Assistant emerging, web payments etc we might benefit from clear, unified vision of customer-focused Google payment mechanisms.
    - [Niko Schroer] The Play store embodies a lot of things that make Google cool from a consumer perspective, still it has never gotten the love of an actual consumer facing marketing campaign. How can we better work with Lorraine´s leadership to unlock a real budget to market Play as a key asset to Android?
  - [LATAM]
    - [Carol] How can we leverage Brand Awareness in markets where we lack marketing budget?
  - [US]
    - [Brooke Davis] With more of Play's partner work moving to an **operations** model, how does this impact DSAT?

Comment [44]: Is this where Social Impact, Digital Wellness, Accessibility fit? I don't like the framing that we only do these things for optics, but I'm unsure where else we'd put them based on the construct here (same issues at Play Level, to be clear. Maybe Android has a theme, trying to find out)

Comment [45]: Positioning could be analogous to a brand awareness campaign in the ads world. We work with these folks to shine a light on the great work they are doing for society.

Comment [46]: +1 to Kirsten's comment. Jihyun and I are thinking seriously about Social Impact and it's not only for optic but for us contributing another angle of value to ecosystem.

Comment [47]: Hooray! Hiroshi just announced a P&E wide effort around Social Good. I think we can align with that.

- [Brooke Davis] How does Play stay **relevant** when apps like Fortnight are bypassing Play? How do we maintain brand equity when the #1 gaming app isn't available on Play?
- [StratOps]
  - [Felix] Does it continue to make sense for Play to brand itself as a place for gamers? It feels there's little differentiation Play can offer to users/gamers if the same content is available at the same time, and easily discoverable on both major platforms. Do gamers feel Play is the place to go for games? It feels like most of the advancements we can make towards gaming are not at a Play level. IE Android or YT are the ones that would make Play the place for gamers.
  - [Darryl Huie] Can we have research on what tools our devs are using to build and test apps? If its internal, leverage use-age data to help them. Integrating with Android Studio for example would allow us to target the developer way in advance when they are thinking about their app or game.
  - [Darryl Huie] Can we incentivize developers to give us the right and updated contacts. Incentivize with Google store credits, invites to exclusive dev events or workshops all integrated into the console. Run ads campaigns to drive developers to look at their developer console.
- [Japan]
  - Can we consider how our consumer marketing team should spend some budget for branding purposes? Their budget appears to have been heavily focused on direct response purposes.
  - How can Play/Android be a competitive brand vs Apple/iPhone in some major mature markets like JP where iOS is performing extremely well.
- [TechOps]
  - [Kris Resellmo] What can we do to ensure communications and CRs we use across our outreach (TechOps + BDOps) are on brand?
  - [Kris Resellmo] How can we identify if something nominated for featuring is not on brand?

STOP:

What are the bottom 10% of activities we do? What can we stop doing in 2019?

- [Lead Name] Idea
- [Michael Marchak] Hypothesis: Portfolio Optimization can reduce A/G/C portfolio load by well over 10% on its own. We need to take advantage of Ecosystem support more.
- [EMEA]

- [Tobias Knoke] Chasing TechOps to follow up on featuring reviews with developers. Ownership for Tech Reviews is still with BD and whilst BD Ops is sending out a "Nomination at Risk" email, BD still needs to push and chase either TechOps or the developer to answer. TechOps does not seem to have a goal to pass the game/app on time to hit the aimed featuring date (if possible). Can we give ownership for the featuring process to either TechOps or BD Ops who would manage this in a more proactive way, ensuring that a game/app gets passed on time (if possible), chasing developers and internal localization teams proactively? Examples available upon request. If deemed applicable for further BDs, we should get things going before 2019.
  - Resource savings: 1 hour/week per BDM
- [US]
  - [Brooke Davis] **Merchandising** on Play has lost its value for established developers. We shouldn't invest in New & Updated or Holiday campaigns for devs with strong user penetration.
  - [Brooke Davis] **One-off EAPs**: need more alignment / visibility for EAPs we support and how they benefit the partner/ecosystem
  - [Brooke Davis] Research / developer participation requests from xfn Play teams
  - [Brooke Davis] Chromebook marketing **requests from HW & other xfn Google teams**
  - [BD Ops] Ad hoc movement from A/G/C service levels to Ecosystem (feasibility TBD)
  - [BD Ops] Googler execution of rule based Product Ops work
  - [BD Ops] Proactive title reviews for large programs (eg IGA reviews, BD Ops reviewed & shortlisted from the 850 applications). This is not FTE work and should be handled by a Temp.
  - [BD Ops] Manual support to AGC partners i.e request from Sarah & ML on BDOps supporting certain FTE-type tasks (not all Account Management support can be pass down to BDOps).
  - [Product Specialists] Working on **EAPs for low-level** Android APIs (examples include Context Manager, Activity Transition API, Activity Recognition API, SMCS API, etc.) which don't really line up or support our higher level BD OKRs around revenue and diversity. Take the visibility hit and have Product teams follow our "self-service" EAP model with a PS monitoring but not leading.
  - [Product Specialists] Managing **marketing approvals for Chrome OS**. Create a self-service model where Marketing teams know who the marketing contacts are at various partners; do outreach for approvals directly to those partners with BD on CC for visibility; PS focuses on process management rather than chasing approvals on behalf of BDMs with half-baked marketing asks.
  - [Startups & VCs] Stop trying to **force fit SOA** in geos where there's no immediate "pull" from local teams~~ -- Korea and Japan have been recent~~

~~examples~~. We've seen this only works where local team is willing to take on the SOA franchise and own it - David Yin in Singapore, Iky and Nacho in EMEA, Jijia in China, and perhaps next are Rachel in TW/HK, Anuj/Karan/Kunal in India.

- [Startups & VCs] Karolis, Nori and team recently had a steering committee review of Play Connect and decision was made to "**Pause work**" and follow up with Dev Rel team to get learnings from agency program and perhaps identify internal Google teams that might have connected with different agencies (eg. marketing, advertising, translation etc.). There were misunderstandings about how easily we could certify or endorse recos of these kind of 3rd parties in a scalable way. In our opinion, it's more likely that V2.0 of our existing Agency Certification program is a better vehicle for this workstream.
- [Startups & VCs] That being said, the Agency Certification program run by Dev Rel is having a hard time scaling certifications~~also struggling to scale beyond the 50-60 participants in the program today.~~ We are experimenting with a lighter weight model that would simply "**verify**" any global agency whose app has been featured in the last 24 months and add them to the directory.~~, but if this doesn't work, it will be very hard to justify ROI on supporting this initiative from what we know today. Gus is attending an Agency 2019 Planning event next week and expects to come back with a clearer picture of whether this is worth pursuing next year.~~ We are also now exploring a partnership with Clutch.co to help scale the directory to more agencies, agency types, and regions.
- [moonlit] Some US Core Game developers make multiple million dollars/month, well above the $1M/month cut-off for Growth, and partner closely with Play on many key initiatives. But as they are labeled Core, they are naturally prioritized lower than Growth in many cross-functional opportunities. Could we not limit developers' opportunity set within Google because of our BD capacity constraints?

- [SEA]
  - Reduce time on policy-related comms with partners. It would be far more efficient for policy support/BD ops to reach out to partners with BD manager intervention if and when required.
- [StratOps]
  - [Ricky Wong] Stop Athena as a BD OkR. We could rather drive app quality through ops teams via things like tailored outreach and techops reviews.
  - [Darryl Huie, Andreas Preuer] Can we stop doing TechOps reviews for featuring? If featuring is strategic, having just a few automated qualifiers could suffice for the quality bar leaving the rest of the decision making to the strategic stakeholders.
- [KR]

Comment [48]: Don't think we need to call these out specifically. There are good reasons why programs like Indie Games are a better choice or other programs make better sense in certain regions.

- ○ [Jamie Adams] What is the best way to allocate our time onto tasks that are not directly related to our current OKRs, but necessary for future?
- ○ [Jamie Adams] Athena as BD OKR. While it is beneficial for devs to be aware of the existing issues, it is up to developers to prioritize based on their resources and business needs. Should we keep on investing our resources on increasing Athena?
- ○ Spending too much time on :
  - ■ [Jamie Adams] product pitching (i.e Daydream, ARCore)
  - ■ [Jiwoong Lee] Products without proper level of tech support.

- JP
  - ○ [Evan Kojima] Sorting out 100+ business cards we receive from partners every quarter.
  - ○ [Evan Kojima] Working on housework chores to protect low profile/quality accounts from mobile carriers and OEMs and spending time to consider how we can improve app quality of their apps: they don't have strong reasons/motivation to implement material design for pre-installed apps.
  - ○ [Evan Kojima] Product/program pitches on behalf of other teams that don't have local team members (in case the product/program doesn't have high priority in the JP market)
  - ○ [Chongsa Kim] XFN consumer promo without meaningful impact or clear impact analysis (E.g. Gift Card Game Promo Campaign costs lots of time and resources for BDM but impact seems relatively limited, small scale Merch seasonal promo)
  - ○ [Chongsa Kim] Cooperation to GBO's one Google JBP initiative when it's only to satisfy their sales OKR
- [TechOps]
  - ○ [Kris Resellmo, Cheryl Jones] Stop Tablet testing, remove option from Playhub nomination. Invest in Chromebooks instead. Remove Cardboard.
  - ○ [Kenneth Lui] Cut down manual L1 reviews drastically, with a combination of automation and moving from resources from in-region teams to lower cost-regions (level of localization check may be reduced but may be a worthwhile tradeoff to make room for more impactful projects)
  - ○ [Kei Kawabata] Reduce L10n load on existing team. Optimize localization reviews by hiring dedicated L10n reviewers where appropriate. Centralize in lower-cost regions as much as possible.
  - ○ [Kenneth Lui] 100% training execution should go to Vendors. Googlers can become Train-the-trainers
  - ○ [Mingoo Kim] Redirect app review prioritization request from ping/trix to PlayHub (KR specific)
  - ○ [Kenneth Lui] Manual reviews that can be automated.

- [Kenneth Lui] gCase 1.0 and ADAM will be deprecated in 2019 by Play DevOps. Any disruption in these tools will pose significant impact on our on-going operations and SLAs. Is StratOps looking into which of our existing tools tied to gCases will no longer work (e.g. Cases Tracker, Issue Tracker)? Is there a transition and data migration plan? Will there be a replacement for ADAM that will continue to serve existing users?

START:

What are new investments we plan to make?

- [LATAM]
  - [Carol Soler] Start reviewing Apps more strictly before they go live to make sure they are policy compliant with our hard required policies. This way we could prevent future security issues and save lot of time on quality checks, warnings and blasts we frequently have to do. We would also offer a better store experience to users with high quality apps and would lead to more successful partners on Play (better performance and monetization).
    - Relevant Play-Wide Theme: More Successful Partners
    - Estimated Resource Needed: TBD
    - XFN Support Needed: DevOps, BDOps, Policy, Legal, Etc.
- [US]
  - [Brooke Fesperman] Promo support for **subscriptions** - to drive new **marketing opportunities**, bundles
  - [Brooke Fesperman] ndustry / user buy-in for subscriptions model - retrain user mindset that app services are free
  - [Brooke Fesperman] **Product training** - more BD training on products vs straight documentation
  - [Brooke Fesperman] Solutions framework for growth consulting - in order to show impact, we need to **provide some recommendation** baseline
  - [Mary Liz McCurdy] Have a more strategic lens to partnership tiers and have a more systematic approach: e.g. Product partnerships to enable product **innovation** (Uber, Facebook), **Revenue** partnerships to drive growth and diversity, (Subscriptions & gaming partners), **Brand** partnerships to drive awareness and adoption (Nike)
    - Play-Wide Theme: Partner Success
    - Estimated Resource Needed: None
    - XFN support needed: % of time for BDMs, no additional FTEs
  - [BD Ops] Reactive Support
    - BDOps global **urgent support**
    - **Unmanaged** support process revamp

Comment [49]: +1

Comment [50]: +1

Comment [51]: +Mary Liz McCurdy +Ricky Singla +Connie Kim +Felix Hu

I really like this framing. It aligns with our review of service levels, but gives me more of an understanding of why we're managing the non-Revenue partners.

Comment [52]: great, happy to provide more color if needed, we are also using approach for the Lifestyle team strategy: https://docs.google.com/document/d/1R4nBIUf48QVal1m6wbW2YEyysn6N5bCp-ZNU5bd4_wc/edit

        - Better **unmanaged** strategy, priority Korea
        - Proactive roadmap on tools needed to support our operations (Strong focus on **Automate** for 2019) i.e Proactive contact management to ensure better developer notifications across Play teams.
    - [BD Ops] Featuring
        - Nomination **Efficiency** initiative
        - AutoNomination
    - [BD Ops] Driving Ecosystem Quality
        - Institute new metric: "value add" engagement with X% of ecosystem developers".
        - Tiered Ecosystem approach: Defining different levels of support based on dev development stage & needs
    - [BD Ops] Product Ops
        - Move coordination tasks to regional vendor leads
        - BD Ops PgMs to become more involved in strategic planning and not involved with execution
    - [BD Ops] Vendor Ops
        - Implement transactional CSat as an additional performance metric
    - [BD Ops] How can we have an **urgent SLA** to BD Managed partners in collaboration with our XFN Play teams dedicated to provide product support?
    - [Product Specialists] Reduce churn via Pause, SWOOP, and flexible renewal dates
    - [Product Specialists] Promotion codes for subscriptions EAP
    - [Product Specialists] Bring new developers to Google Play Billing by adding new monetization models
        - Help devs monetize w/o API integration (e.g. in-Store tipping, donations, carrier data plans)
        - Enable new in-app items for devs who can't use GPB today (e.g. payouts, auctions, metered, donations)

    - [Product Specialists] Enable developers to sell more effectively on Google 1P surfaces
        - Create a single platform for devs to sell across Google properties (e.g. Play, SwG, AoG, Search)
        - Extend key 3P features to 1P platforms (e.g. promotions, bundling, subscriptions features)
        - Use 1P platforms as a test bed for 3P features
    - [Product Specialists] Grow subscriptions with new and intelligent acquisition and retention features. New focus on Emerging Markets.
        - Acquire subscribers with improved user experiences (e.g. new signup surfaces and new user models)
        - Improve subs retention with new churn features (FOP-dependent features, choose renewal date, etc).

        - Add subscribers in emerging markets by building features specific for those markets
        - Proactively offer pricing and features based on market and user intelligence
        - Solicit feedback regularly from these devs via dev council and sat surveys
    - [Product Specialists] Help *all* devs grow spend with minimal work by launching an updated, intelligent API
        - Release a new (mandatory) Billing Library that makes integrations easier and future-proof
        - Make out-of-app purchases a first-class citizen in the API. Require all apps to support it (e.g. purchases from Play Store, web, ads, other apps, etc).
        - Provide optimizations at the time of purchase (e.g. experimentation, cart abandonment feedback, better price guidance, promotions, automatic offer generation)
    - [Product Specialists] Introduce deeper technical support for vitals issues experienced by partners, in conjunction with DevRel
    - [Product Specialists] Full investment across the org on Playhub CRM solution. Purnima's recent email about Hiroshi convo and instant apps awareness is a great example: Raj's email to her should have taken 5 minutes, but it took an hour since he had to comb through a trix and setup a Pivot table to get the data she needed. EAP Dashboard is a great POC and I want us to move forward especially since StratOps has built features like Interaction Tracking and Activity Tracking (for pre-launch and post-launch programs like Subs currently). Via this tool, I want PS to be able to manage 2x the number of heavy programs we manage today, without any additional workload on our plates/lack of work-life balance due to the efficiency gain from having this tool properly staffed, supported and implemented.
    - Better tools to measure adoption and impact. Not only from a product level (overall product reach globally and per region/country) but also from a developer level. We need better tools to analyze potential of growth so our partners understand the ROI in developing for these platforms.
    - Android Camera: Address API and device fragmentation and let developers focus on the core competency
    - Strobe: Various permissions/policy changes that we need to help developers navigate
    - 64 bit Android: Starting Aug 2019 all apps are required to be 64 bit. This will be a big challenge for games.
    - Android Q and future OS versions: Early access program to obtain developer feedback.

- [SEA]
  - Provide pricing-related insights and recommendations to partners as part of growth consulting solutions
    - Play-Wide Theme:More Successful Partners
    - Estimated Resource Needed:
      - TBD
    - XFN Support Needed: Dev console team, Growth consulting
  - Double down on e-sports by driving x-fn focus on this area
    - Play-Wide Theme:More Successful Partners, Gaming
    - Estimated Resource Needed:
      - TBD
    - XFN Support Needed: YouTube, Cloud
  - OEM Partnerships in collaboration with Android BD: explore partnerships with OEMs in the region with a focus on growing gaming engagement and monetization
    - Play-Wide Theme:More Successful Partners, Gaming
    - Estimated Resource Needed:
      - TBD
    - XFN Support Needed: Android BD, Gift cards team
  - Develop different engagement/business model with top local and regional publishers with shared downstream goals
    - Play-Wide Theme:Gaming
    - Estimated Resource Needed:
      - TBD
    - XFN Support Needed: GBO,
- [StratOps]
  - [Olivia] Import investments: If we are to take import seriously and if we end up getting import BD headcount, we should have import OKRs, e.g. # of titles per market, $ impact.
  - [Swarnesh Raj] New push system for opportunities. Using what we have from Growth consulting and Business review reports, we should invest time in highlighting where the opportunity lies. We could have both a coservative and more aggressive estimations for these. Breaking these up by region and different sectors could also inform our planning strategy - resource allocation etc
  - [Darryl Huie] Should we build out technical consultations for games as an extension of growth consultations? Performance benchmarking against iOS seems reasonable here. Should we have a joint collaboration with DevRel or just help them scale and help our team double down on the business side?
- JP

- ○ [Evan Kojima] Identify the next big strategic partners who can leave industry-wide impact (like Cookpad and Nikkei, who announced strong support for GPB in the App Monetization Day after multiple-year negotiations) and start sewing seeds for the future
- ○ [Evan Kojima] Further support on go-global so that high quality apps can be appropriately localized/culturalized and accepted by local users without leaving any unnatural scent
- ○ [Evan Kojima] Secure time to experience the latest technologies by ourselves, attend external events/seminars to gain food for thoughts, and use more apps
- ○ [Chongsa Kim] Bold investment in AI. Our partners see Google as the company of AI technology now and they expect partnering more closely with us in this area to cause innovation together.

- [TechOps]
  - ○ [Kenneth Lui] Technical consultation focusing on vitals, performance, latency and network optimizations. Collaborate with PS and DevRel to scale technical reviews, leverage tools that can automate some of these tests.
  - ○ [Gavin Kinghall Were] Engage more with the Growth Consulting team to see what aspects of their work, if any, could be scaled using vendors. Additionally ensure that what their and our consultation recommendations are in agreement.
  - ○ [Mingoo Kim] Localization of external developer resources and documentation around quality guidelines and enabling platform/feature adoption, especially in mature markets such as Korea and Japan.
  - ○ [Gavin Kinghall Were, Kris Resellmo, Lisa Vu, Steven Tepper] Invest resources in prioritizing automation to replace manual review steps as much as possible. In areas where automation is not feasible, take a very hard look at the ROI from a developer and user's perspective. Some tradeoffs may be necessary. This can free up resources to focus reviewers on higher impact consultations
  - ○ [Gavin Kinghall Were, Kevin Liu] Scaled Monetization Consultations. Consult with partners at scale on how to better monetize their title. Background: Subs Upsell consultations are the first monetization-focused consultations we are doing. However, there are many related consultations that we can expand to once Subs Upsell is operationalized
  - ○ [Kenneth Lui] Bring in local subject matter experts to speed up launching of GoGlobal programs in new regions.

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